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ECONOMIC GROWTH IN EASTERN EUROPE IN 1964

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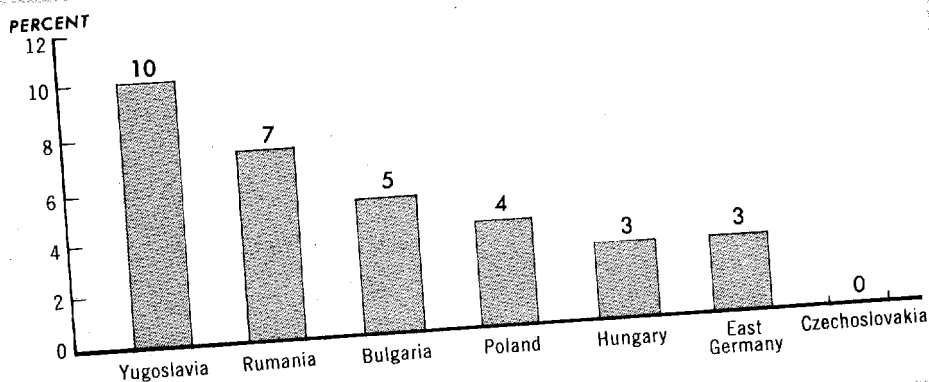
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ECONOMIC GROWTH IN EASTERN EUROPE IN 1964

Economic growth in the Communist countries of Eastern Europe* in 1964 continued the pattern of recent years -- slow growth in the industrial countries and rapid growth in the less advanced countries. Gross national product (GNP) did not grow at all in Czechoslovakia, following a decline in 1963, and the increases of about 3 percent in East Germany and Hungary, although close to the average rates of growth achieved in 1961-63, were far below those of the late 1950's. In contrast, GNP grew at least 5 percent in Bulgaria, 7 percent in Rumania, and 10 percent in Yugoslavia -- above the average for 1961-63 and, except for Bulgaria, above the 1958-60 rates as well. In Poland, an in-between case, GNP increased at least 4 percent in 1964, close to the average rate prevailing since the mid-1950's.

EASTERN EUROPE: PERCENTAGE INCREASE IN GNP*
1964



*Data for Albania are not available.

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Industrial production in Eastern Europe grew faster in 1964 than in 1963. This improvement, however, was partly due to the fact that an unusually severe winter had depressed production in the northern countries in the first quarter of 1963. If the first quarter is excluded from the comparison, the percentage increase of industrial production in 1964 is reduced by from 0.5 to 1 percentage point in Czechoslovakia,

* Including Bulgaria, Czechoslovakia, East Germany, Hungary, Poland, and Rumania as well as Albania and Yugoslavia.

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East Germany, Hungary, and Poland. In agriculture, crop production fell or held even in 1964, whereas livestock production increased as a result of the relatively good crops of 1963. In foreign trade the share of Free World trade increased in every country of Eastern Europe except Yugoslavia, where it declined sharply, and possibly Rumania, for which data are not yet available. Data on economic growth and foreign trade in Eastern Europe in recent years are given in Tables 1 and 2.

The developed countries of Eastern Europe are in a state of transition from a period in which opportunities for growth were easy and cheap to one in which success depends on much finer calculation and more sophisticated execution. The regimes have adopted more sober growth policies and are experimenting widely with new techniques of management so as to improve quality of production, to accelerate introduction of new technology, and to increase exports to the West. So far, however, they have had little success, and substantial progress will require long and sustained efforts and possibly some basic reforms of the economic system.

1. Bulgaria

Industrial growth in Bulgaria in 1964 was at about the same rate as in 1961-63 (a little more than 8 percent) -- slower than in Rumania and Yugoslavia, but faster than in any other Communist country of Eastern Europe. Completion of the first stage of the Burgas petroleum refinery and the Kremikovski steel combine boosted industrial production. Agricultural production, which had been stagnating since 1959, increased in 1964, and Bulgaria is the only country of Eastern Europe where a substantial increase occurred in both the crop and livestock sectors. Bulgaria in 1958-60, which included the period of the "great leap," had the fastest economic growth in Europe. The sharp decline in rates of growth since then is due partly to the excessive efforts of the "great leap" period. In view of the relatively early stage of Bulgarian industrial development and the receipt of substantial credits from the USSR (averaging more than \$50 million a year since 1961), current rates of industrial growth are not high. This relatively poor performance probably is the main reason why the Bulgarian regime is seriously concerned with the efficiency of economic planning and management and is experimenting widely with profit incentives and reduced central control. In 1964 the USSR offered Bulgaria assistance in the form of new credits valued at nearly \$600 million, for use in 1965-70.

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2. Czechoslovakia

Even if this year's plan is fulfilled, national income in Czechoslovakia in 1965 will barely surpass the level of 1962 -- the worst performance since World War II for so long a period among the world's industrialized countries. The regime claimed an increase of more than 4 percent for gross industrial production in 1964, compared with a decline of 0.7 percent in 1963. On a net basis, however, the increase probably did not exceed 2 percent, not enough to offset last year's drop of 3 percent. In agriculture, output of animal products increased, but crop production declined. This decline will have unfavorable effects on livestock this year. Both capital investment and personal consumption increased in spite of the lack of growth in national income -- by a claimed 12 percent and 3 percent, respectively. These increases were achieved because imports grew much more than exports, and presumably inventory accumulation was reduced. In foreign trade, the export surplus, although sharply cut, was still the second largest in 8 years. The share of Western countries in Czechoslovak trade increased from a level of 25 percent in 1963 to 27 percent in 1964, after having declined in 1962 and 1963.

The improvement in Czechoslovak industry in 1964 is due mainly to a substantial increase in imports of industrial materials -- the first such increase in 3 years -- and to the end of the shortage of electric power. However, in view of the continued rise in the consumption of materials per unit of industrial output, the continued shortcomings in quality and assortment of products, and the growing shortage of labor, this improvement gives the regime no cause for complacency. There may be some further increase in rates of industrial growth when large investment projects in basic industries, such as the Kosice steel combine, are brought to fruition. A marked improvement is unlikely, however, without a sustained effort to achieve a more efficient industrial structure and a thorough reform of industrial management. The prolonged economic recession has forced the regime to promise some radical reforms of planning and management, although the method of implementation and the effects of these reforms are still highly uncertain.

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3. East Germany

The gradual improvement since 1962 in the East German economic situation continued in 1964. The improvement is not so much in the rate of growth of production as it is in the ability to make effective use of increased production instead of merely adding to excess inventories. If allowance is made for changes in weather, industrial growth was no higher in 1964 than in 1963 and was slower than the 1961-63 average. There was only a small increase in agricultural production above that of 1963. Capital investment, however, grew significantly (6 percent), and there probably also was some increase in personal consumption. Both capital investment and consumption had started to rise in 1963 after a stagnation of 2 years. An important achievement of 1964 was the completion of the first stage of the Schwedt petroleum refinery. Foreign trade turnover increased 10 percent, and trade with the West, including West Germany, increased almost twice as fast as total trade.

The improvement in East German economic performance is attributable partly to the regime's more realistic economic planning since 1961. Lower planned rates of growth have permitted greater emphasis on quality and new technology, and there are signs that the quality of East German products offered on world markets has been improving and that the East German consumer is getting a wider choice and somewhat better quality. However, the revisions of the system of management, which began to be introduced last year, probably have not yet had much effect on economic efficiency.

4. Hungary

Hungary increased its rate of industrial growth in 1964 to about the 1961-63 average, if allowance is made for changes in weather. This gain, however, was achieved only because employment grew more rapidly and the already substantial foreign trade deficit increased further. On the whole, Hungarian economic performance in the past few years has been respectable although unspectacular, with rates of growth averaging 7 to 8 percent in industry (net) and of around 4 percent in GNP. Personal consumption has improved slowly but steadily in both quantity and quality, and a flexible approach to incentives for agriculture, including the use of profit-sharing schemes, has somewhat mitigated the unfavorable effects of collectivization. Hungary has had the fastest per capita growth

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among the more advanced countries of Eastern Europe -- as fast as that of Poland for total GNP and industrial production, although the Hungarians had a much more slowly rising population and labor force. The ability to shift labor from agriculture to industry, as well as moderate and pragmatic policies, has helped to achieve this favorable performance. The reserves of labor are running out, however. In addition, Hungary is highly dependent on foreign trade and is finding it increasingly difficult to make or keep its products competitive on world and Bloc markets. Consequently, substantial reforms of the system of management and a decline in rates of growth are likely in the next few years.

5. Poland

In contrast to the shortage of labor in Hungary, Poland has too much labor. This is both a blessing and a curse. It is a blessing because increased employment continues to be a means of compensating for inefficiency -- something East Germany, Czechoslovakia, and Hungary can no longer do -- and of providing badly needed services for the population. At present the regime is encouraging the expansion of handicrafts. It is a curse because of the difficulty of steering an appropriate course between the dangers of inflation and a low growth of real wages, which occur when employment increases too fast, and an increase in actual or hidden unemployment, which results where employment grows too slowly. Since the mid-1950's, there has been very little if any deceleration in Polish industrial growth -- the marked improvement in 1964 over 1963 (an unusually poor year) was essentially a return to average growth. This improvement was achieved in spite of a reduced growth of employment and a dramatic shift in foreign trade from a deficit of \$209 million in 1963 to a surplus of \$24 million in 1964. Poland had not had a surplus on commodity trade since 1955. The extraordinary increase of 18 percent in exports was aided by a favorable market for foodstuffs in Western Europe, but all categories of exports did well. Total imports increased only 4.7 percent, although imports of materials grew more than 14 percent, giving strong support to the industrial boom. The share of the Free World in Polish trade increased from 35 to more than 36 percent, the highest share in 3 years, and Polish imports from every country of the Soviet Bloc apparently declined.

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The achievement of a surplus in 1964 -- probably quite a large one if invisible transactions are included -- should have permitted Poland to reduce its indebtedness and possibly to increase its foreign exchange reserves, which had been very low. The main weak spot in the Polish economy continued to be agriculture, where an increase in livestock production barely compensated for a decline in the output of crops. The recent lack of growth of agricultural production has prevented any increase in supplies of animal products, and a substantial increase in imports of grains was necessary to meet consumer demand. Over-all, however, there was a small increase in both capital investment and per capita consumption in 1964.

6. Rumania

Rumania in 1964 continued to have the highest rate of industrial growth in Eastern Europe, registering about 13 percent. This growth rate has shown no tendency to decline since the late 1950's and is higher than that achieved in the mid-1950's. The industrial goal of the Six Year Plan (1960-65) for 1965 will certainly be overfulfilled, and most industrial branches are doing well. Agricultural production, however, has stabilized since reaching a postwar peak in 1959 and in 1964 was approximately the same as in 1963. Last year was an excellent year for corn, Rumania's principal export crop to the West, but only an average year for wheat. Capital investment grew at about the same rate as in 1963, although more slowly than in 1958-62, and there probably was a slight rise in per capita consumption. Although no data have been released as yet on the geographic distribution of foreign trade, Rumania has had considerable success in obtaining medium-term commercial credits from the West for the purchase of machinery and technical services, and, as a result, there may have been an increase in the trade deficit with the industrial West.

7. Albania

The Albanian economy appears to have recovered from the worst effects of the break with the USSR and the cessation of credit-financed deliveries from Eastern Europe, both of which occurred in 1961. Following the break, imports fell sharply and in 1962 were about 20 percent below the level of 1960. A recovery began in 1963, however, and by 1964 imports were near the level of 1960. A trade deficit of more than \$20 million a year since 1961 has been financed by credits

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from Communist China, in line with Chinese commitments for the 1961-65 period. Albania cushioned the domestic impact of the decline in imports by letting the burden fall almost entirely on investments. Imports and investments in machinery and equipment in 1962 and 1963 were about half of those in 1960. The effect apparently was mainly to delay the completion of investment projects. Construction work continued and even increased, and in 1964 there apparently was a substantial recovery in imports of machinery and equipment. Industrial production also continued to increase, at a reduced, although still respectable, annual rate of around 7 percent, supported by increased imports of industrial materials. Supplies of imported manufactured consumer goods are still less than before the break, but credit-financed imports of grains have maintained the diet at the usual low level.

8. Yugoslavia

In sharp contrast to its sluggish performance in 1961-62, Yugoslavia in the past 2 years has had the fastest economic growth in Europe -- about 16 percent a year for industrial production and about 10 percent for GNP. Its current economic problems result largely from the dislocations and inequities accompanying this extraordinarily rapid growth -- especially inflation and a worsening of the balance of payments. A contributing factor has been the lack of growth of agricultural production since 1959, following a rapid increase in the late 1950's. Domestic expenditures increased much more in 1964 than available supplies of goods and services, leading to inflation and a general price freeze in March 1965. Expenditures in fixed investment grew about 30 percent in current value, and the personal income of employees rose by one-third. The cost of living rose 12 percent, however, and the inflation had highly differentiated effects on the population. People on relatively fixed incomes were worse off than before, but farmers (who received 25 percent more for their products than in 1963) and most skilled workers were better off.

Imports increased 25 percent and exports only 13 percent. Some of the increased imports were used to rebuild the city of Skopje, which was largely destroyed by an earthquake last year. Trade with Communist countries increased by 53 percent, reaching 31 percent of total Yugoslav trade in 1964 (compared with 25 percent in 1963). A

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Table 1
Eastern Europe: Indicators of Economic Growth
1958-64

Percent								
	<u>Albania</u>	<u>Bulgaria</u>	<u>Czecho-slovakia</u>	<u>East Germany</u>	<u>Hungary</u>	<u>Poland</u>	<u>Rumania</u>	<u>Yugo-slavia</u>
Gross national product <u>a/</u>								
1958-60 <u>b/</u>	N.A.	8.8	6.8	5.3	5.7	4.7	6.1	6.7
1961-63 <u>b/</u>	N.A.	4.2	1.4	2.7	4.1	4.6	5.3	6.3
1963	N.A.	5.3	-1.4	2.0	4.7	5.8	5.4	10
1964 <u>c/</u>	N.A.	5	0	3	3	4	7	10
Net industrial production <u>a/</u>								
1958-60 <u>b/</u>	16.5 <u>d/</u>	15.5	9.3	8.2	8.8	8.5	13.7	13.2
1961-63 <u>b/</u>	6.5 <u>d/</u>	8.3	2.6	4.0	7.8	7.7	13.2	9.8
1963	6.7 <u>d/</u>	8.0	-3.0	3.7	5.0	5.4	11.6	15.6
1964 <u>c/</u>	7.4 <u>d/</u>	8.5	2	4	8	8	13.5	16
Capital investment								
1958-60 <u>b/</u>	18.0	32.7	15.1	13.1	27.8 <u>e/</u>	10.8	19.6	N.A.
1961-63 <u>b/</u>	-0.7	8.4	-2.3	2.5	5.4	7.1	15.6	N.A.
1963	5.5	14.6	-11.0	5.4	14.1	3.0	10.0	N.A.
1964	30.8	6.7 <u>f/</u>	12.2	6	7	4	11	N.A.

- a. Estimated, except for data on net industrial production in Yugoslavia, which are from official sources.
b. Average annual increase.
c. Preliminary estimates.
d. Gross industrial production.
e. 1959-60 average.
f. Centrally planned investments only.

Table 2
Eastern Europe: Foreign Trade
1959-64

	1959	1960	1961	1962	1963	1964 (Preliminary)
Million Dollars						
Trade turnover						
Albania	119.3	129.6	120.8	105.5	118.8	136
Bulgaria	1,046.5	1,204.0	1,328.5	1,557.3	1,767.3	1,812.5
Czechoslovakia	3,329.7	3,745.3	4,070.2	4,263.8	4,622.2	5,025
East Germany	4,113.7	4,360.3	4,477.6	4,734.0	4,988.2	5,470
Hungary	1,562.5	1,849.7	2,054.5	2,248.0	2,511.3	2,847
Poland	2,564.7	2,820.5	3,190.3	3,531.5	3,749.0	4,168.7
Rumania	1,024.6	1,365.2	1,607.5	1,759.4	1,937.4	2,170
Yugoslavia	1,163.8	1,392.5	1,479.2	1,578.2	1,847.0	2,214.0
Surplus or deficit						
Albania	-51.3	-32.5	-23.6	-23.7	-22.6	-20
Bulgaria	-112.3	-61.1	-3.4	-12.1	-99.2	-37.7
Czechoslovakia	124.7	113.9	22.6	123.4	301.2	167
East Germany	129.1	20.7	45.2	-12.2	396.0	N.A.
Hungary	-23.3	-101.9	3.4	-49.4	-99.7	-143
Poland	-274.5	-169.5	-183.1	-239.3	-209.0	24.3
Rumania	20.4	69.2	-22.2	-123.2	-107.0	N.A.
Yugoslavia	-210.6	-260.2	-341.3	-197.2	-266.3	-429.2
Percent						
Share of the Free World in trade turnover						
Albania	3.3	3.5	5.0	5.2	6.6	N.A.
Bulgaria	17.6	16.0	14.9	17.3	17.7	18.7
Czechoslovakia	27.8	28.2	30.3	25.8	25.4	27.0
East Germany	23.9	25.0	23.9	21.0	21.4	23.0
Hungary	28.9	29.1	28.0	27.4	30.3	31.2
Poland	37.4	36.9	37.5	35.4	34.7	36.1
Rumania	20.2	27.0	31.3	32.1	31.1	N.A.
Yugoslavia	72.3	71.6	76.2	77.1	75.3	68.6

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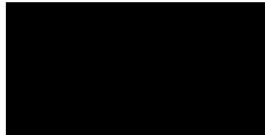
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CENTRAL INTELLIGENCE AGENCY
Washington, D.C. 20505

28 April 1965

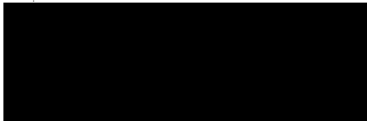
MEMORANDUM FOR: Recipients of CIA/RR CB 65-25, Economic Growth
in Eastern Europe in 1964, April 1965, CONFIDENTIAL

SUBJECT : Correction of CIA/RR CB 65-25

Delete the classification of the chart on page 1.

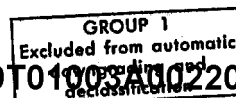
FOR THE ASSISTANT DIRECTOR, RESEARCH AND REPORTS:

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 RECORD OF REVIEW OF ORR PUBLICATIONS FOR SECURITY/SANITIZATION APPROVAL

SUBJECT			ANALYST	
16.5241 CB 65-25			[REDACTED]	
			BRANCH	EXTENSION
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SECURITY REVIEW			22 Apr 65 MB SANITIZING INSTRUCTIONS	
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REMARKS
 CB is based entirely on open source material per
 analyst, 14 Apr 65
 (11 May 65 MB)
 Deletions for [REDACTED] 25X1C
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